



Mid Atlantic Regional Market Report

Seventh National Green Power
Marketing Conference

September 30 – October 2, 2002

Anne Marie McShea

Center for Resource Solutions

Green-e Mid Atlantic

Tel: 215.569.88078

Email: amcshea@resource-solutions.org

Who We Are....

Welcome to Green-e

a program of the Center for Resource Solutions



- CRS is a non profit organization (501(c)3) and independent third party that certifies green power products sold in competitive retail electricity markets, regulated markets, and nationwide through Tradable Renewable Certificates (TRCs).
- The Green-e program promotes product quality, consumer confidence and best practices in green power procurement.



green-e.org

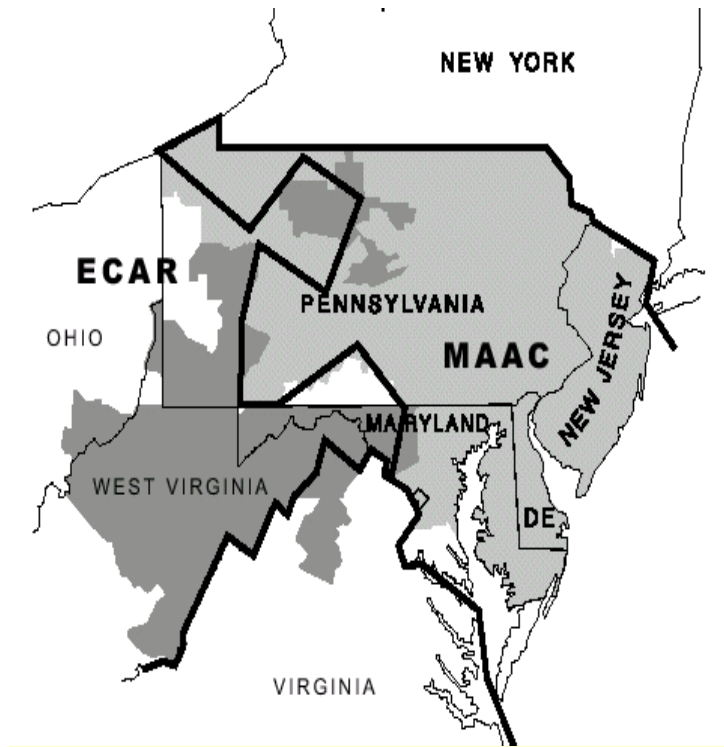
Mid Atlantic Regional Report

- PJM Market Overview
- Market Innovations 2002
- Mid Atlantic State Updates
- New Capacity 2003-2004



green-e.org

Mid Atlantic / PJM Market Overview



PJM - Mid Atlantic Power Market

PJM / PJM WEST Electric ISO

- 71, 600 MW Capacity
- The largest competitive electricity market in the world, serving over 8% of the U.S. population.
- Serves 25 million people across seven-state region including Pennsylvania, New Jersey, Delaware, Maryland, Virginia, West Virginia, Ohio and Washington D.C.
- Designated platform for use in FERCs planned RTO.
- 2002 PJM West and PJM South expansions



green-e.org



Mid Atlantic / PJM Market Overview

	Market Open (all customers)	Disclosure	RPS	CEF	State GP Purchase
PA	Jan. 2000	N*	Y*	Y	Y
NJ	Nov. 1999	Y	Y	Y	Y
MD	July 2002	Y	TBD	N	Y
DC	Jan. 2001	Y*	N	Y	N
DE	April 2001	Y*	N	Y*	TBD
VA	Jan. 2002 / Jan. 2004	N	N	N	N

Source: EIA, Status of State Electric Industry Restructuring Activity as of September 2002



green-e.org

Mid Atlantic / PJM Market Overview

Green-e Marketers and Suppliers



Green-e Certified Products*

PA	10
NJ	7
MD	7
DE	6
DC	8
VA	6

*Wholesale, commercial and retail



green-e.org



Market Innovations 2002

- Tradable Renewable Certificates (TRCs) - 6 Green-e Certificate Providers (May 2002)
- PJM Generator Attribute Tracking System under development.
- Green power suppliers are partnering with utilities and competitive suppliers to reach new customers.
- Climate neutral linkages are growing particularly among university purchasers.
- PA/NJ Financing spurring new solar projects.



green-e.org

Mid Atlantic State Updates

- Pennsylvania
- New Jersey
- Maryland / D.C.
- Delaware
- Virginia



green-e.org

Mid Atlantic State Updates

- Green power residential markets are hampered by market rules and pricing structures.
- Large users, particularly government and institutional purchasers, have been a key driver in building a regional green power market and are spurring new growth.
- Business customers in the C&I sector are a key hurdle for 2003. WRI Green Power Market Development Group members may provide leadership in bringing new projects on line.
- Three of six Mid Atlantic states currently have Green Power Procurements (MD, PA, NJ) which are likely to expand in terms of percentage of new renewables.
- The Green Power Market has grown beyond its initial successes in Pennsylvania, in terms of demand and capacity, towards a more regional market.



Mid Atlantic State Updates

Leading Sectors for Consumer Demand

- Universities and Colleges

(PA, D.C., NJ)

- State Governments

(MD, NJ, PA)

- Federal Government

(DoE, GSA, USDA, DESC - DoD, NIH, NASA, Veterans Affairs)



green-e.org

Mid Atlantic State Updates

Green Power Purchasers

- The Commonwealth of Pennsylvania (5%)
- The State of New Jersey (12%)
- Maryland State Government (6%)
- Catholic University (12%)
- 29 PA Universities (CMU, Upenn, PSU, PSHE etal)
- U.S. Department of Energy (17%)
- USDA
- Philadelphia Liberty Bell (GSA / NPS)
- Kinko's
- Johnson & Johnson*
- BJ's Wholesale Club*
- Ikea Pittsburgh*

* Solar / PV Purchases



green-e.org



Mid Atlantic New Wind Capacity

Project	Location	Status	MW	On Line By
Energy Unlimited (Humboldt Industrial Park)	Hazleton, PA	Under Development	0.13	Mar 2002/ 65kW
Exelon Power Team & Community Energy Inc. (Waymart Wind Farm)	Canaan Township, Wayne Co., PA	Proposed	61.1	2002 / Nordex 1300
Global Winds Harvest, Inc.	Bear Creek & Jefferson Townships, PA	Proposed	18.2	Dec 2002 / Nordex 1300
Atlantic Renewable Energy Corp. / Mortenson (Backbone Mtn)	Tucker County, WV	Permitted	65.0	Mid 2002 / GE Wind 1500
Mega-Energy Inc.	Horse Shoe Run area, Preston County, WV	Proposed	10.0	Dec 2002
U.S. Windforce, LLC	Mt. Storm, Grant City, WV	Permitted	150.0	Mid 2003
U.S. Windforce, LLC	Mt. Storm, Grant City, WV	Permitted	100	2004
US Wind Force	Big Savage MT , Allegany, MD	Proposed	45	Late 2003
US Wind Force	Brothers Valley (Garrett, Somerset PA)	Proposed	15	*
ProVento (Cape Charles Sustainable Technology Park)	Northhampton County, VA	Proposed	7.8	2002 / Nordex 1300
Meyersdale (Atlantic Renewable)	Somerset County, PA	?	30-48	2003
Mountaintop (Energy Unlimited)	Luzerne County, PA	Proposed	16.9	*

Source: Compiled from AWEA, *Wind Energy Projects Throughout the United States*, Updated July 03, 2002), Various Media Sources



green-e.org

Strength in Diversity...



green-e.org